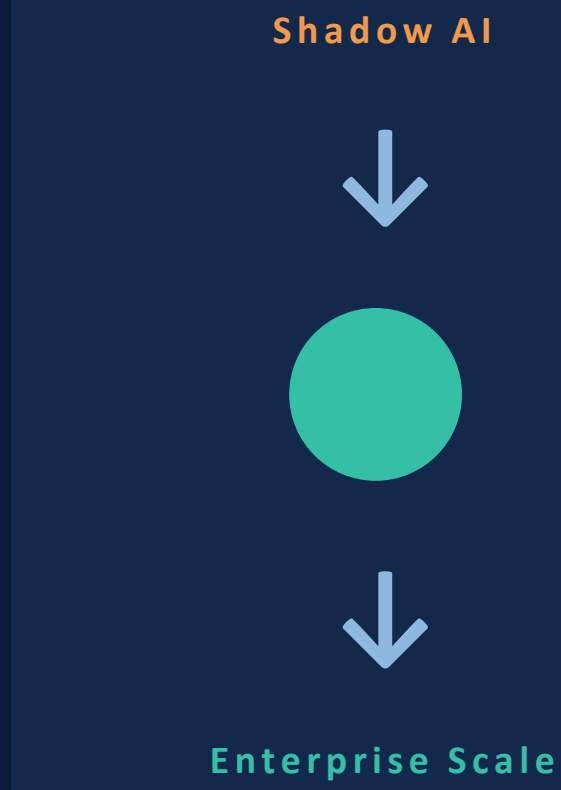
A CASE STUDY · AGENTIC AI TRANSFORMATION

# From Shadow AI to Enterprise Scale

A case study from Grassroots to Global: Scaling Agentic AI from Bottom-Up Experimentation to Top-Down Enterprise Transformation

*The problem · what broke · what we learned · the playbook · the results*

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Vice President, AI & Data Strategy



> AI experimentation exploded across the enterprise.
>
> **The challenge was no longer generating ideas. The challenge was scaling them safely — across people, governance, and operating models.**

# Challenges

*What we encountered as experimentation spread — the exact frictions that block scale.*



## Shadow AI / Grassroots Chaos

- Fragmented tools
- Duplicate agents
- Inconsistent API use
- Ungoverned execution



## The Pilot Trap

- POCs succeed
- Scaling fails
- High latency
- Unpredictable cost



## Governance Friction

- RBAC for agents
- Identity management
- Auditability
- Prompt-injection risk



## Enterprise Integration

- ERP & CRM
- Legacy core systems
- Tool-calling at scale
- Transaction integrity



## Workforce Adaptation

- Human-in-the-loop →
- Human-on-the-loop
- Redesigned roles
- New operating models

*These were not theoretical concerns — they were the day-to-day reality of scaling beyond experimentation.*

ACT 2 · WHAT BROKE

# What broke when we tried to scale

*Three failures shaped everything we did next.*

## The Pilot Trap

**WORKED**

- Copilots
- Team experiments
- Local automation

**BROKE**

- Reliability at scale
- API latency
- Cost control
- Observability

**Lesson** ***A successful proof of concept is not an enterprise capability.***

## Governance

**WORKED**

- Small controlled pilots

**BROKE**

- Enterprise approval
- Agent identity & RBAC
- Auditability
- Security review

**Lesson** ***Missing governance — not governance itself — was blocking scale.***

## Integration

**WORKED**

- Isolated demos

**BROKE**

- ERP & CRM workflows
- Legacy core systems
- Transaction integrity

**Lesson** ***The challenge wasn't the model. It was connecting the model to enterprise reality.***

# What we learned

ad-hoc adoption → AI-native organization

*After hundreds of experiments, four dimensions had to move together.*



## 1 · Technology

***Build the foundation***

- AI tools & platforms
- Workflow integration
- Enterprise data & access
- Security & guardrails



## 2 · People & Community

***Create the movement***

- AI Guild & Special Interest Groups (SIGs)
- Quarterly town halls
- AI Champion Network
- AI Socials
- Training & peer learning



## 3 · Leadership & Governance

***Create direction & scale***

- AI Council
- Executive sponsorship
- Strategic priorities
- Year-end objectives
- Investment & accountability



## 4 · Outcomes

***Demonstrate impact***

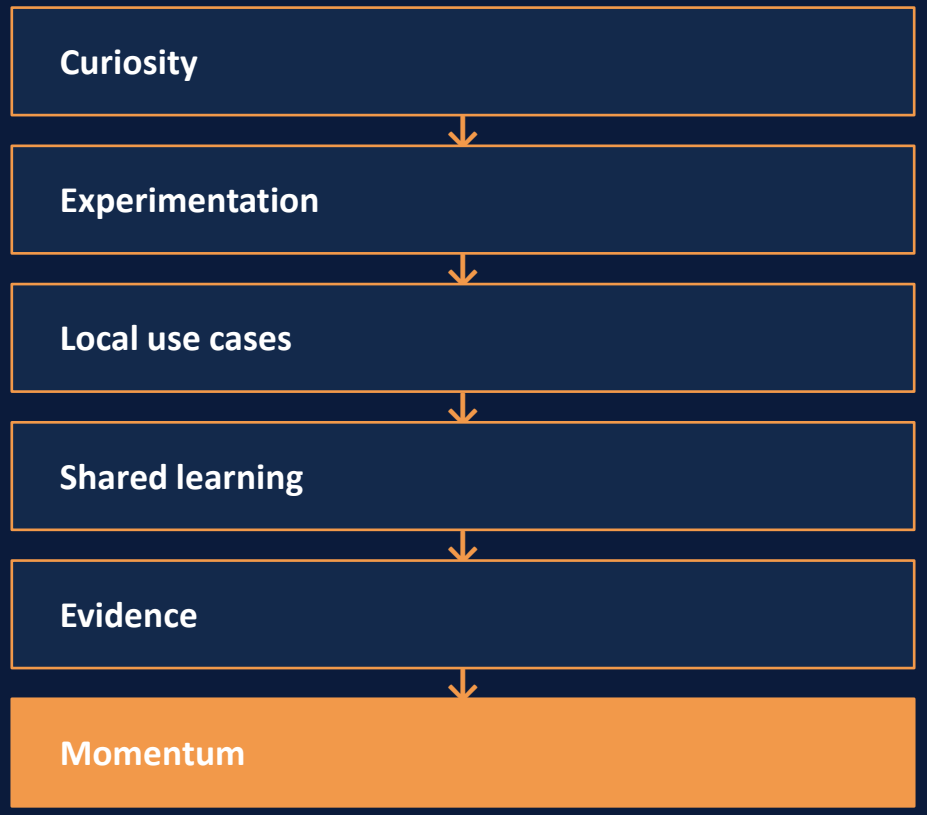
- Productivity ambition
- Developer experience
- Cycle time & quality
- Employee experience
- Business value

*At the centre: organizational adaptation — if any dimension disconnects, progress slows.*

THE PLAYBOOK · STEP 1

# Enable responsible experimentation

*We did not mandate transformation. We enabled curiosity — within safe boundaries.*




Principle

## The people closest to the work often see the opportunity first.

Our role was not to prescribe every use case — it was to make responsible experimentation easier and help promising ideas become visible. The conversation shifted from “Where can we deploy AI?” to “Where does work need to change?”

THE PLAYBOOK · STEP 2

# Build communities and champions

*Communities turned individual experimentation into organizational learning.*

## AI Guild & Special Interest Groups (SIGs)

- Connects practitioners & enthusiasts
- Brings disciplines together
- Hosts the annual AI Guild Fest
- Builds identity & momentum

## AI Champion Network

- Activates adoption in local teams
- Translates AI into relevant use cases
- Supports peers & collects feedback
- Surfaces scalable opportunities

## AI Socials

- Shares experiments & reusable practices
- Connects people on similar challenges
- Space for practical problem-solving

## Engagement & Learning

- Quarterly AI town halls
- Role-based training
- Demonstrations & success stories
- Peer learning & knowledge exchange

**AI Literacy** *meet people where they are* → **AI Fluency** *capability grounded in real work* → **AI Impact** *measurable outcomes at scale*

THE PLAYBOOK · STEP 3

# Create an enterprise foundation

### AI experiences

Copilots · specialist tools · agents

↓

### Workflow integration

Business processes · engineering practices

↓

### Enterprise context

Data · systems · identity · permissions

↓

### Trust & control

Security · privacy · evaluation · monitoring

## Lessons learned

- Start with the work, not the product feature
- Integrate into existing workflows
- Reduce unnecessary tool fragmentation
- Establish guardrails early
- Design the operating model with the architecture

THE PLAYBOOK · STEP 4

# Embed AI into real delivery workflows

*Break delivery into stages, target a specific outcome for each, then apply focused tools that solve it.*




**The connective layer** shared context & data · orchestration · identity & access · automated governance

**Anchor every stage to a measurable outcome — then integrate the tools end-to-end.**

THE PLAYBOOK · STEP 5

# Turn governance into an accelerator

*What surprised us: inconsistent governance — not governance itself — was slowing us down.*

### GOVERNANCE AS A GATE

Manual review boards, one-off approvals and slow sign-off — experimentation moves at the pace of the slowest committee.

↓

### GOVERNANCE AS GUARDRAILS

Policy-as-code, automated risk and compliance checks and continuous monitoring — teams move fast within safe, pre-approved boundaries.

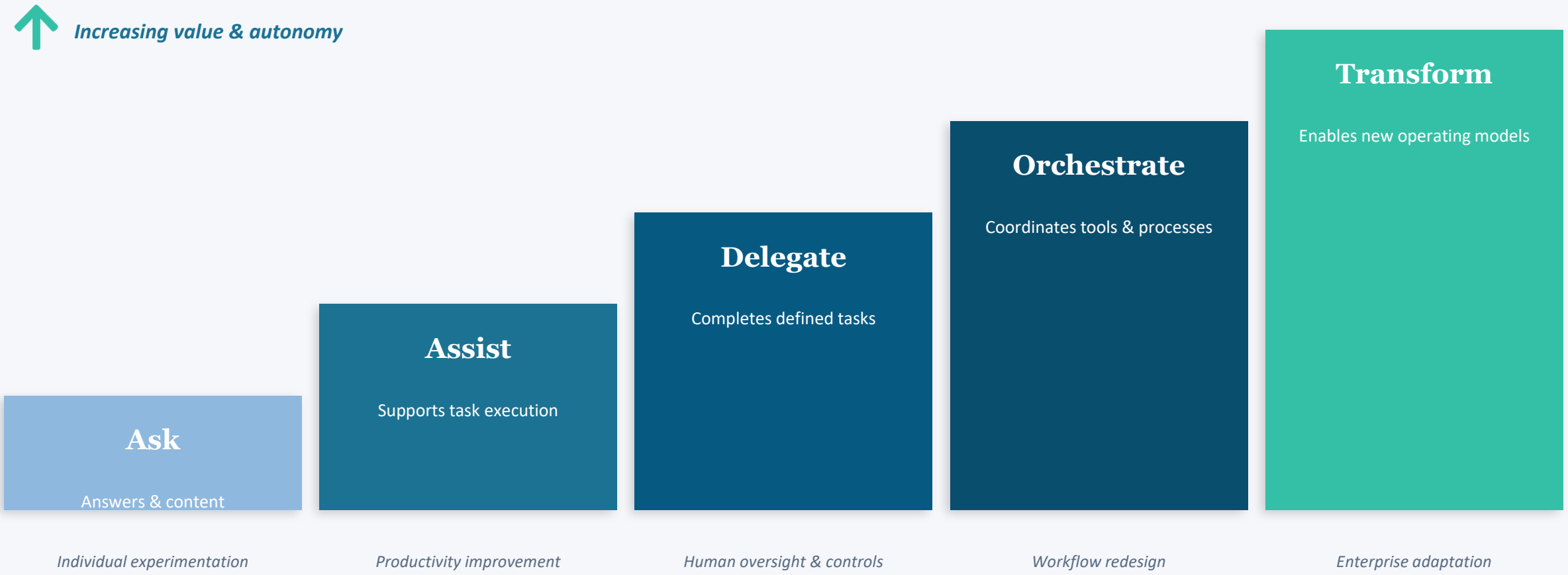
## Automation levers

- Policy-as-code & automated guardrails
- Self-service sandboxes with pre-approved patterns
- Automated evaluation, red-teaming & monitoring
- Reusable templates & golden paths

**Governance done right doesn't slow experimentation down — it's what lets you say "yes" faster.**

# Move beyond individual productivity

*The value grows as AI moves closer to the workflow — and changes how work is designed.*



# What changed beyond technology

*Agentic AI doesn't just speed up tasks — it shifts what work is, and where people add value.*



*from* **Execution**

*to* **Judgment**

As AI handles the doing, human value shifts to framing problems, setting direction, and deciding what "good" looks like.



*from* **Tasks**

*to* **End-to-end problem-solving**

Work moves from isolated tasks to owning whole outcomes — orchestrating people and agents across the flow.



*from* **"Costly to fail"**

*to* **"Learn faster"**

Cheap, safe experimentation changes the economics of trying — the advantage goes to whoever learns quickest.

**This is why adaptation — not capability — is the real constraint.**

# How we measured success

*Adoption was necessary — but not sufficient. We needed evidence of realized value.*



## +xx pts

Rise in perceived AI value (RIVA) over two years, among AI-using leaders and individual contributors.



## RIVA

Realized Individual Value of AI — measures work quality, speed and stress, not just whether tools are used.



## Reinforcing

Frequent users report higher value, feeding a virtuous cycle — value drives use, and use drives value.

**Chapter 1 · Access**
Deploy tools · drive adoption · track usage

**Chapter 2 · Value**
Is that use translating into something meaningful?

*Perceived value — not adoption rate — is the metric that decides whether AI investment holds.*

# The leadership multipliers

*Bottom-up created energy. Top-down created direction and accountability.*

ALIGN

## AI Council

- Set strategic priorities
- Coordinate enterprise decisions
- Address risk & governance
- Focus investment

COMMIT

## Enterprise Objectives

- Establish year-end goals
- Assign functional ownership
- Define target outcomes
- Create leadership accountability

MOBILIZE

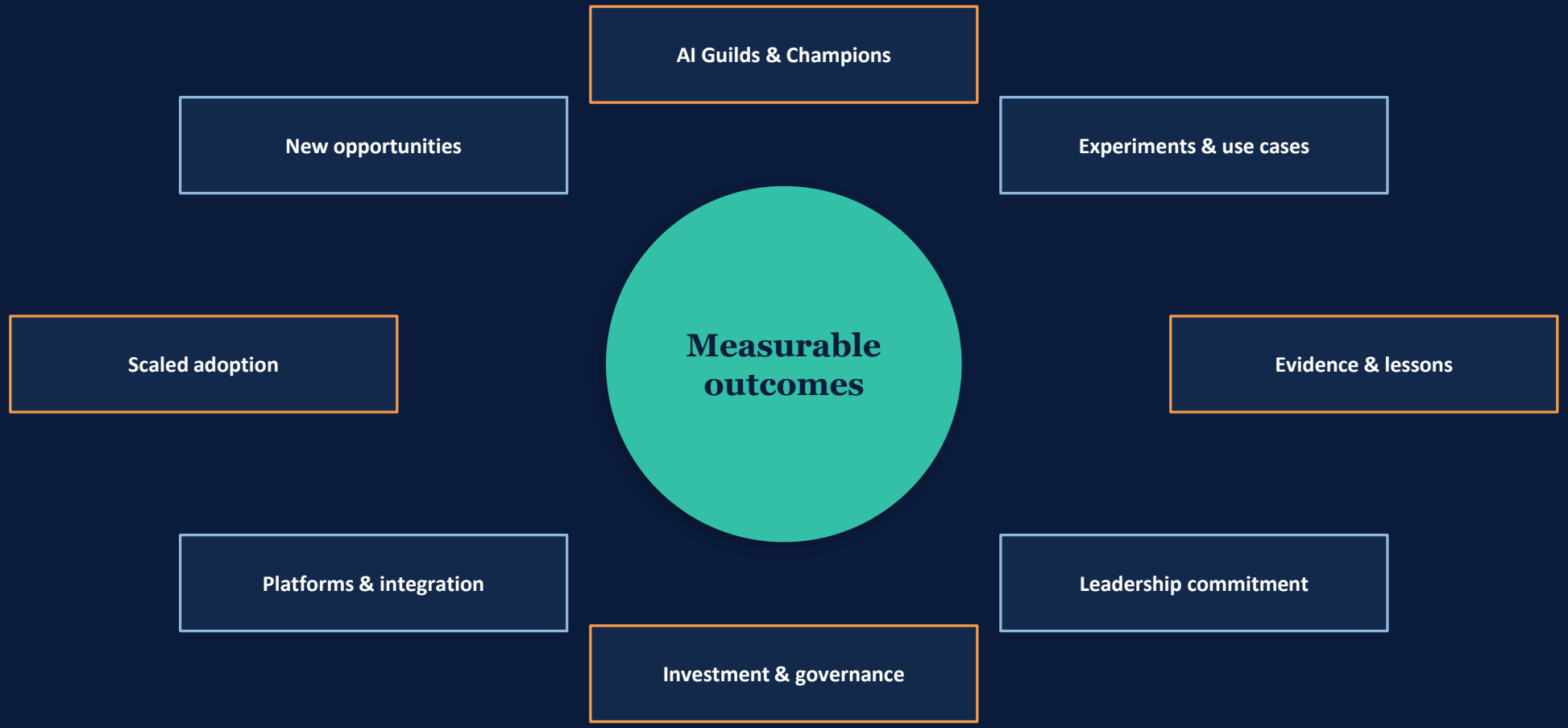
## Leadership Engagement

- Encourage experimentation
- Offer personalized support
- Articulate a compelling vision
- Model AI use themselves

*The four behaviours of transformational leadership — adapted for the age of AI.*

# What scaled

*Bottom-up innovation and top-down commitment formed a reinforcing system.*



# Did we create business value?

*Our ambition: ~10% improvement across the delivery lifecycle, ~25% improvement on targeted initiatives — but what does that actually mean?*

| | | |
|---|---|---|
| 1 | **Access** | Do employees have the right capabilities? |
| 2 | **Usage** | Are they using AI? |
| 3 | **Adoption** | Repeatedly, in meaningful work? |
| 4 | **Work outcomes** | Speed, capacity, quality, new ways of engaging? |
| 5 | **Business outcomes** | Is the organization creating more value? |

Key principle

## Hours saved are not automatically productivity gained.

Value depends on how the released capacity is reinvested — that requires leaders, process owners, employees and measurement working together.

# Five lessons learned

*If you take five things from this case study, take these.*

| | | |
|---|---|---|
| 01 | **Start with work, not technology** | The best use cases came from friction in real workflows — not from tool features. |
| 02 | **Governance must accelerate experimentation** | Automated guardrails let us say “yes” faster; manual gates were the real bottleneck. |
| 03 | **Communities scale better than mandates** | Champions and guilds spread adoption faster than any top-down rollout. |
| 04 | **Adoption is not value** | Usage told us people showed up; RIVA told us whether work actually got better. |
| 05 | **The operating model matters more than the model** | Redesigning how work is done mattered more than which AI model we used. |

THE LESSON

# Every firm becomes a Learning System

*We began with isolated experiments. We ended with a repeatable operating model.*

### Grassroots experimentation

discovers what is possible.

### Enterprise leadership

creates the conditions to scale it.

### Measurement

shows whether transformation is really happening.

1 Employees lift the ceiling → 2 Leaders re-architect work → 3 The organization learns

**The organizations that win will not simply deploy AI faster — they will learn and adapt faster.**

# Thank you